Benefits Administration User Guide
for
Health Insurance and Life Insurance Insurance Coordinators

Personnel Cabinet
Department of Employee Insurance
and
Kentucky Group Life Insurance

February 2013

Introduction

This Benefits Administration User Guide is designed to assist Non-Commonwealth Paid Insurance Coordinators (ICs) with KHRIS processes of both health and life insurance plans for their Employees.

Updates to this User Guide will be published quarterly, if needed, according to changes in processing.

As of February 2013, ICs are asked to use the following matrix for processing:

Actions To Be Completed by IC	Actions To Be Sent to DEI or KGLI via paper application
❑ New Hire Enrollment	❑ Cross-Reference Payment Options
❑ Employee Demographic Updates/Changes	❑ Transfers
❑ Terminations	❑ Qualifying Events
❑ Reinstatement of Benefits (without break) in Employment for a Rehire	❑ Evidence of Insurability (EOI) – KGLI only
❑ Beginning LWOP-non FMLA	❑ Leave Without Pay (LWOP) w/premium-KGLI only
❑ Health Benefit Enrollment Reporting	❑ All Cancellation of Coverage Requests-KGLI only
❑ Plan Change History Report	❑ End Leave Without Pay
❑ Insurance Plan Cost Report	❑ Dependent Demographic Data Changes
❑ Life Policy Conversion Letter (s)	❑ Reinstatement with Break in Employment
❑ Smoker Status Report	
❑ Health Post Tax Participants Report	

Note: The above matrix will be changed and ICs will be asked to complete more processes in KHRIS as additional training and User Guide updates are made available. **Please do not use the KHRIS Qualifying Event (QE) work list to report qualifying events. Mail Applications/documentation to Department of Employee Insurance (DEI) Enrollment Information Branch or Kentucky Group Life Insurance (KGLI).**

Questions and/or suggestions for improvements to this User Guide should be directed to:

Department of Employee Insurance
Enrollment Information Branch Manager
502-564-5530
501 High Street, 2nd Floor
Frankfort, KY 40601

Kentucky Group Life Insurance
Branch Manager
502-564-4774
501 High Street, 3rd Floor
Frankfort, KY 40601

Table of Contents

All personal information has been redacted throughout these process steps. Any names or other identifying information you may see are fictitious and were created specifically for this document.

<u>Insurance Coordinator Responsibilities Related to Health and Life Insurance</u>

This section is designed to provide you with a guide to your everyday responsibilities as an Insurance Coordinator. In order to best assist your Employees, it is important that you have knowledge of the insurance plans offered, an understanding of how the plans work, know the eligibility requirements and be familiar with the forms used by KEHP and KGLI as listed at http://personnel.ky.gov/dei/ and http://personnel.ky.gov/emprel/gli.

As a representative of an agency that participates in KEHP and KGLI, an IC is responsible for the following actions:

I. Attend IC Training conducted by the Department of Employee Insurance (DEI) and Kentucky Group Life Insurance (KGLI) including:

    1. New IC Training

        a. KHRIS Access Training - online training that includes modules on the Health Insurance Portability and Accountability Act (HIPAA) and an overview to KHRIS. Once required modules are completed you must complete the security paperwork to gain access to KHRIS. Online training modules are located at https://ky.train.org
        b. KEHP and KGLI Policies and Procedures training for new ICs

    2. Open Enrollment and Spring Training to learn about updates and plan changes

    3. HIPAA Training – required within 30 days of hiring a new IC; and then annually for all ICs

    4. Consolidated Omnibus Reconciliation Act (COBRA) Ceridian Training

- Training information can be found on KEHP's website: Trainings

II. Provide new Employee(s):

    1. Current health insurance information and application

- Training on benefits available including a copy of the New Employee Checklist and web address to obtain the Summary Plan Descriptions: 2013 Summary Plan Descriptions

    2. . KGLI coverage information can be located at http://personnel.ky.gov/emprel/gli/

    3. Training on enrollment requirements
        a. Set up new Employees in the KHRIS portal
        b. Show new Employees how to elect benefits using Employee Self-Service (ESS)

    4. Training on qualifying events and deadlines
        a. Sign and submit forms to DEI and KGLI
        b. Request supporting documentation from Employee

5. Information on COBRA
   a. Enter qualifying events into Ceridian's WebQE System

6. Open Enrollment information

III. Process Employee enrollment, termination, leave without pay (LWOP), social security number corrections, birth date corrections, name change, and address actions in KHRIS in a timely manner.

IV. Provide DEI and KGLI (if applicable) with Update Forms for Employee transfers, military leave begin/end, retirement, death, cross-reference payment option elections, and qualifying events in a timely manner.

V. Manage monthly bills by reconciling, processing and releasing the life and health premiums, administrative fees, flexible benefits and health reimbursements within Biller Direct if your duties include Billing Liaison.

VI. Counsel Employees on health insurance questions and provide contact details where they may receive additional information.

VII. Be familiar with and use the KEHP Administration Manual, KGLI Nationwide Commonwealth Summary Plan and this User Guide to complete your responsibilities as an IC.

Welcome to KHRIS Online Benefits Administration System

After you have logged onto KHRIS using your Employee ID and password

Select the "Insurance Coordinator NCP1" tab

Select "KHRIS Transactions" (select from menu on left)
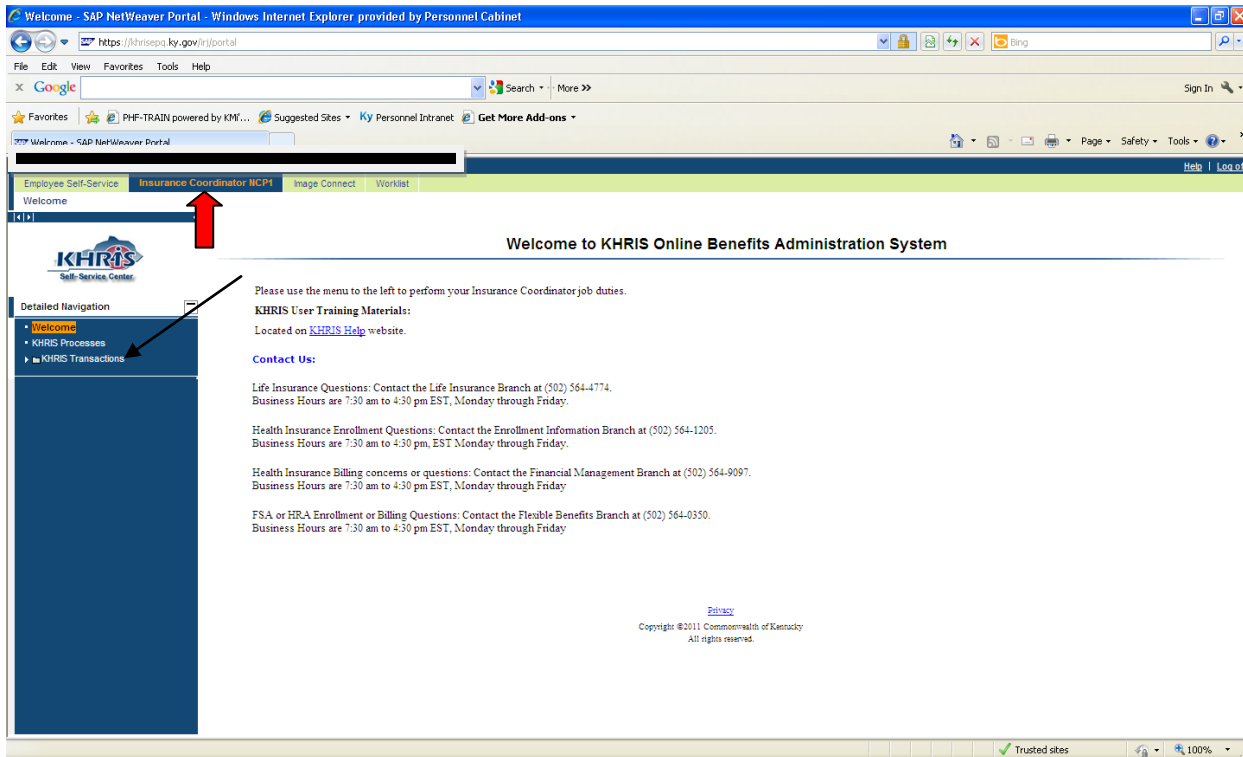
Note: This screen is the first screen that you will see after you select the "KHRIS transactions" tab. Then you will select your transaction from menu on left.
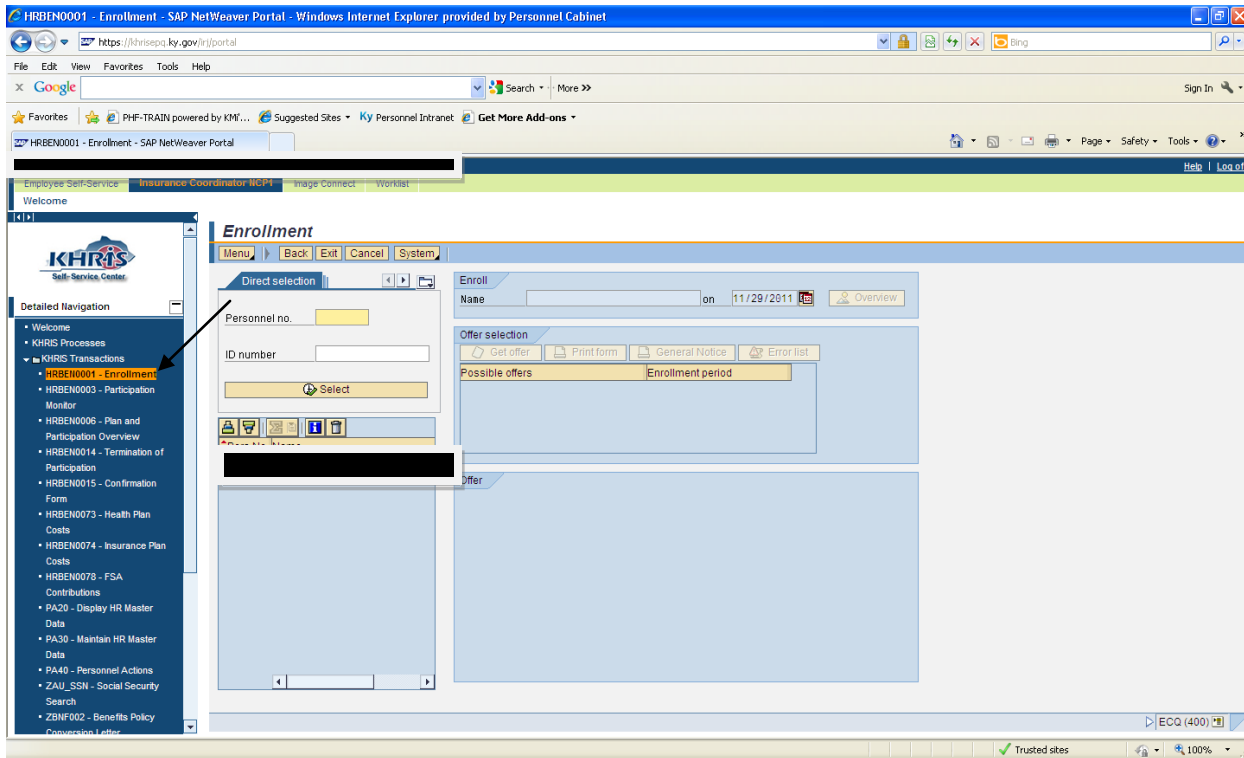
Enrolling a New Hire

A new hire for **this transaction** is a newly hired Employee who has never been covered under KEHP. This new hire is not a returning retiree, transfer from another Agency, dependent (spouse/child) on another KEHP plan, or participating in a "new" cross-reference payment option (a newly hired Employee who was a dependent on spouse's family plan, but now hired and wanting to begin a cross-reference with spouse). These types of transactions would need to be forwarded to DEI Enrollment Information Branch for processing.

Step1: ZAU_SSN- Social Security Search (select from menu on left)

Enter Employee's SSN in the search box. Click "SSN Search". If name is not found, click "Cancel" to proceed to next search engine.
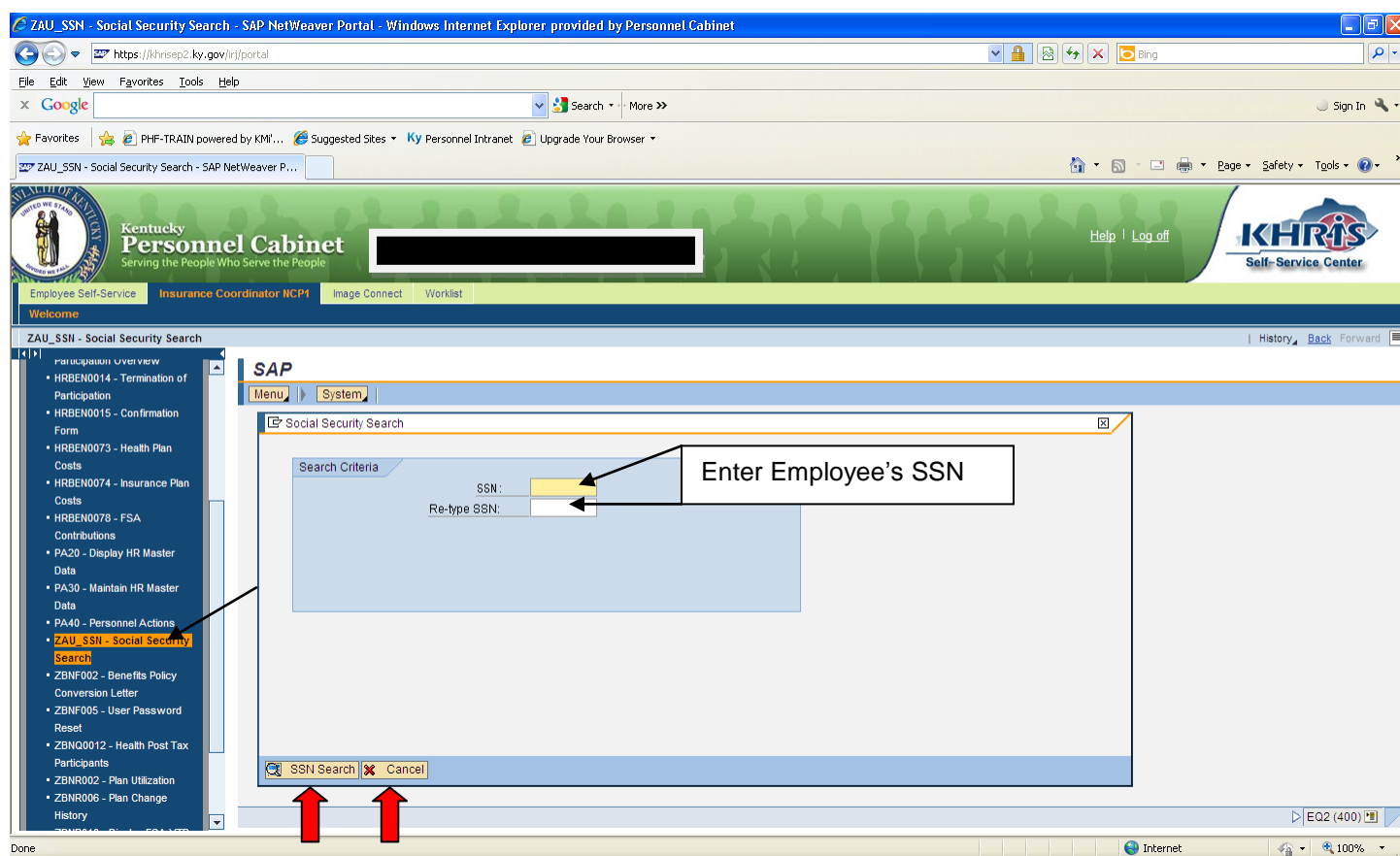
Select "ZBNR013-Dependent Search By SSN" (select from menu on left). **Do not** change the reporting period dates, these dates are indicating the current date you are performing the search. In the "Dependent SSN" field, enter Employee's SSN. Then select "Execute".

If no records are found for the Employee, click "Exit".

Step 2: PA 40 Personnel Actions (select from menu on left)

After SSNs searches have been completed and there no values found, select PA 40 Personnel Actions (select from menu on left).

In the "From" field enter Employee's date of hire

In Personnel Actions box, click "Begin Participation" (highlight)

Click "Execute"

Create 0000 Actions

Click on the "Reason for Action" field, (drop down box will appear) choose (01) New Employee

In the "Position" field enter 99999999 (always)

In the "Personnel area" field enter 0004 -Benefits Only

In the "Employee group" field enter L -External BN

In the "Employee subgroup" enter 41 -24 Non-paid

Click "Save"

Create 0001 Organizational Assignment

In the "Cost Ctr" field enter Agency's cost center number (this is specific to your Agency)

In the "Sub Area" field (use drop down box for type of Agency) enter Agency type (i.e. school board, health dept, etc)

In the "Position" field enter 99999999 (always)

In the "Org. Unit" field enter Agency's organizational unit number (this is specific to your Agency)

Click "Save"

Note: Remember to write down the Personnel No. for the Employee.

Click "Enter"

Create 0002 Personal Data

Enter Employee's Name, SSN, Date of Birth, Gender and Marital Status

Click "Save"

Create 0006 Addresses

Enter Address (If Employee has a P.O. Box, address should be entered in "Address line 1")

Enter Telephone Number

Use the Communications box, if Employee needs to list additional telephone numbers (use drop down for type)

In the "County Code" field select Employee's home county (use drop down menu)

Click "Save"

Create 0105 Communication

In the "ID/number" field, enter Employee's email address. **Note:** Employee should use email (work or personal) they want published to receive health and life benefit information. If Employee does not want to publish their email address, select "Next record" to move to next screen.

Click "Save"

Copy 0008 Basic Pay

In the "Annual salary" field enter annual salary (if information is available)

Click "Save"

Click "Enter" to acknowledge message at bottom of screen

Click "Enter"

Create 0041 Date Specifications

Enter Original Hire Date (Z1)

Enter Current Hire Date (Z2)

Click "Save"

Click "Enter"

Click "Enter" to acknowledge message at bottom of screen

Note: Benefit Elig. Date does not need to be entered as KHRIS generates the date (this can be verified by checking date specifications in PA 20-Display HR Master Data in the menu selection).

Create 0171 General Benefits Information

No information is to be entered on this screen, (dual Employee, hazardous duty, and cross-reference are processed by DEI Enrollment Information Branch) **but** verify the information is correct.

Click "Save"

Do not enter any information on this screen. Verify information; click "Save"; and proceed to next screen.

Create 0378 Adjustment Reasons

No information is to be entered on this screen. View the dates to make sure correct ("to" date should be 35 days from hire date).

Click "Save"

Step 3: PA 30 Maintain HR Master Data (select from menu on left)

Note: This screen (under Benefits tab) is used to add Dependents, Beneficiaries, and/or smoking status.

In the "Personnel No." field, enter Employee's Personnel No (Personnel No. was assigned to the Employee in PA 40)

Click "Enter" (verify Employee's information)

Select "Benefits" tab

Select Infotype "0021 Family Member/Dependents" (highlight)

Select "Create"

To add a child, select "2 Child" or select which dependent status applies to Employee (highlight). For health **insurance enrollment only**, choose 1 Spouse; 2 Child; or 9001 Court-Ordered Dependent.

Click √

In the "Start" (date field) enter the Employee's Date of Hire

Enter Personal Data of Dependent (Name, Gender, Birth date and SSN)

Click "Save"

Click "Enter"

Use the same steps above if needing to add additional dependents.

Note: If Employee is selecting "single" coverage, this step is not needed if not adding dependent(s) on health plan. **BUT** continue to next step to add Beneficiary Information for the Life Insurance plan. (The same screens used to add dependents for the health plan will be same screens used to add beneficiary information for the Life Insurance plan.) If Employee is adding an External Organization, i.e. charitable organization as a Beneficiary, see page 31 for instructions.

If the Employee has a disabled dependent, the Employee's information only can still be processed, **BUT** the application needs to be forwarded to the attention of Kimberly Dennis or Jeff Wiley at the DEI Enrollment Information Branch to enroll the disabled dependent. The disabled dependent's information **should not be entered.**

Adding Smoker Status

If Employee **IS** a smoker;

Click "Benefits tab"

Select Infotype "0376 Benefits Medical information"

Click "Create"

Select "Smoker"

Change "Start Date" to hire date

Click "Save"

Adding Life Insurance Beneficiary Information

Note: **IF** dependent(s) were added for the health insurance plan and the same dependent is also a Beneficiary for the life insurance plan, **DO NOT** add the dependent(s) again (i.e. child has already been added under Infotype 0021 as a dependent for health coverage, and is beneficiary for life insurance).

If you are not in PA30 Maintain HR Master Data, then select from menu on left

In the "Personnel No" field enter Employee's Personnel No

Click "Enter" (verify Employee's information)

Select "Benefits" tab

Select Infotype "0021 Family Member/Dependents"

> **Infotype 0021 is used to add beneficiary information for an Employee with a single plan, <u>OR</u> to add additional dependents (i.e. spouse) that was not added for the health plan (i.e. Employee wants child covered on health plan as a parent plus <u>BUT</u> wants to add spouse along with child for beneficiary for life insurance plan.)**

Select "Create"

Select "1 Spouse, 2 Child, or 9003 Other Beneficiaries" (highlight)

Click √

In the "Start" date field enter the Employee's Date of Hire

Enter name, gender, birth date and SSN of Beneficiary

Click "Save"

Use the same steps above if needing to add additional beneficiaries.

Creating an External Organization as Beneficiary

Note: This transaction is to be used if an Employee wants to have an External Organization (i.e. trust fund, charitable organization) without designated dependents/others as a Beneficiary for life insurance benefits.

If you are not in PA 30 Maintain HR Master, select the transaction from menu on left

In the "Personnel No" field enter Employee's Personnel No

Select "Benefits" tab

Select Infotype "0219 External Organizations" (highlight)

Click "Create"

In "Start" date field, enter Employee's signature date (from application)

Under the "External organization" box, (use the drop down menu) select either charity organization or trust fund

Enter all required information

Note: Use the drop down box for the "Country Key" field. Select USA. **This needs to be done prior to selecting the Region/State.**

Click "Save"

After creating "Infotype "0219 External Organizations", the below screen will appear

Note: The message "Record created" will display at the bottom of the screen.
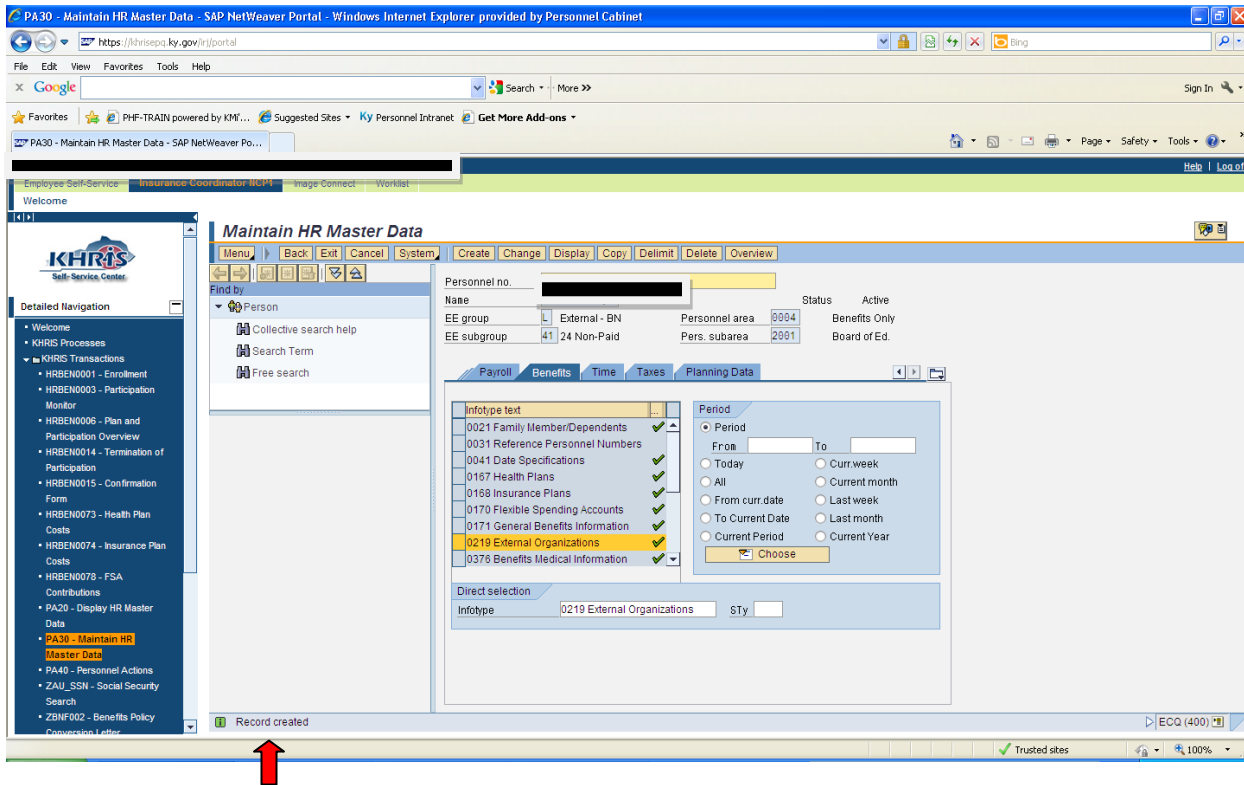
Step 4: HRBEN0001-Enrollment (select from menu on left)

In the "Personnel No" field enter Employee's Personnel No (number was assigned to Employee in PA 40)

Select "Calendar", enter Signature Date (**Note:** If signature date precedes the hire date, **THEN** use the hire date in this field).

Click "Select"

Highlight New Participant

Click "Get Offer"

Note: HRBEN0001 uses the date entered to validate that the Employee signed his/her contract within the allotted 35 day period. If the signature date is outside of the 35 day period, the

HRBEN0001 transaction will not allow you to enroll the Employee for benefits. This is one of the few enrollment "checks and balances" that KHRIS provides.

Select "Medical" (select health insurance plan selected by Employee)

Note: Make sure screen resolution is set at 75% (if needed) so you can view entire screen.

Select "Dependent Coverage" (for this example, Employee added son) – choose Parent Plus (if single, just click "Accept")

Select "Dependent (s)"

Click "Accept"

Enrolling into Life Insurance

To enroll in the Life Insurance Basic AD&D and Optional (if applicable), continue on same screen

Select "Basic Life AD&D"

Select "Accept"

Select "Optional Life"/"Dependent Life" (if applicable). Only do this step if **needed**. If not needed, go to page 63 to complete enrollment for Health/Basic Life AD&D and FSA benefits (if applicable).

Choose Optional Life or Dependent Life if applicable (this is a cost to the Employee)

Click "Accept"

Enrolling in Flexible Spending Accounts (**Note:** Enrolling into Healthcare FSA/Dependent Care FSA is a cost to the Employee)

Select "Healthcare FSA/Dependent Care FSA" (if applicable). Only do this step if **needed**. If not, go to page 63 to complete enrollment for Health/Basic Life AD&D benefits.

Choose Healthcare FSA if the Employee has elected this benefit.

In the "Contribution" field, enter the full **annual** amount selected by the Employee

Click "Accept"

Choose Dependent Care FSA if the Employee has elected this benefit

Only do this step if **needed**. If this step is not needed, go to page 63 to complete enrollment for Health/Basic Life AD&D benefits.

In the "Contribution" field, enter the full **annual** amount selected by the Employee

Click "Accept"

Select "Enroll"

Select "Enroll"

You will receive acknowledgement "Enrollment completed successfully"
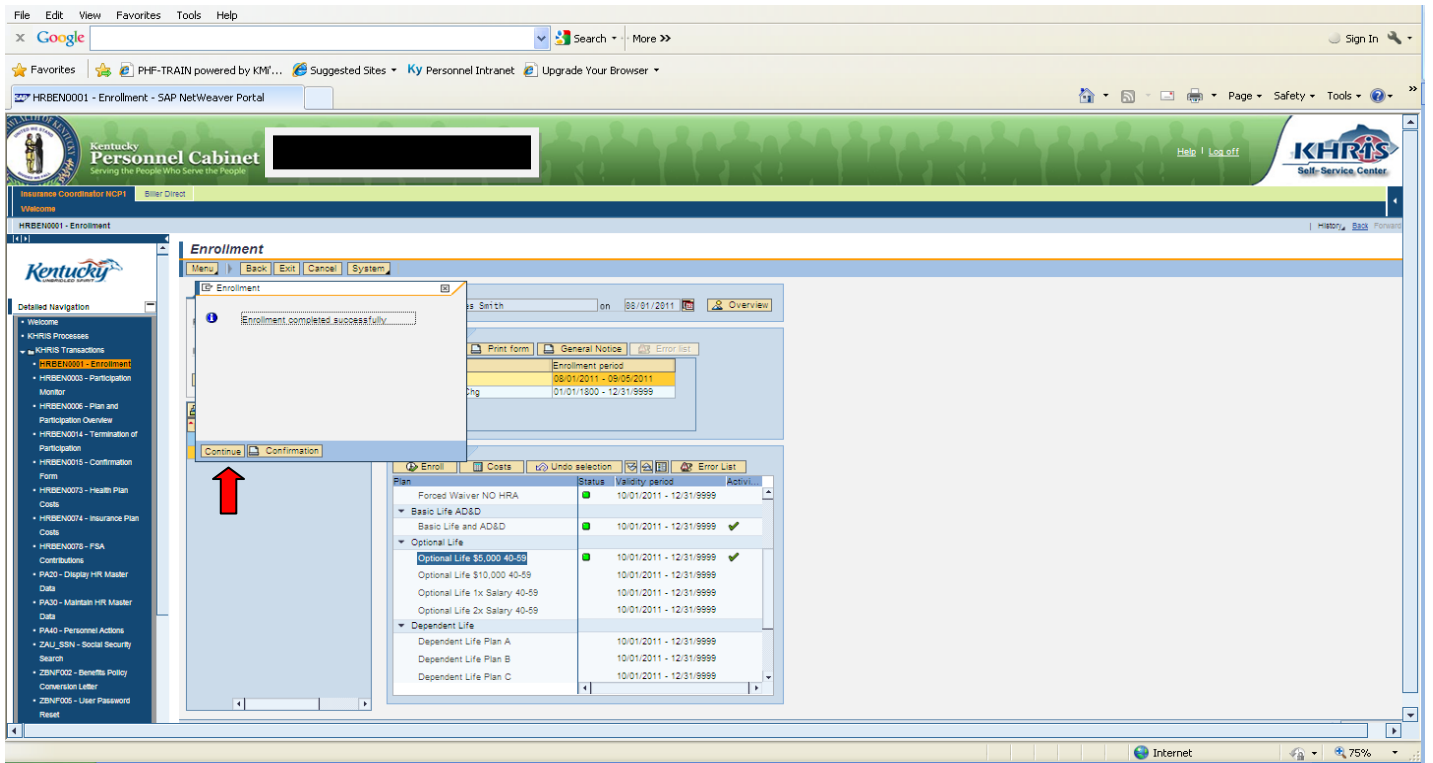
Select "Continue"

Designating Beneficiary(ies) into Life Insurance Plan (s)

On the same screen, enter Beneficiary information

Select "Life Beneficiary Chg" (highlight)

Note: Does your Employee know? If a death occurs and a minor (a person not of legal age) or the insured's estate is the Beneficiary, it may be necessary to have a guardian or a legal representative appointed before any death benefit can be paid; this means legal expenses for the Beneficiary and delay in the payment of the insurance. Please advise Employee to take this into account when naming a Beneficiary.

Percentages must be designated for the beneficiary(ies).

Select "Get Offer"

Select "Basic Life and AD&D"

Select "Beneficiaries tab"

Enter percentage (%). Beneficiary (ies) may be designated as a contingent Beneficiary by checking the contingent box.

Click "Accept"

Click "Optional Life/Dependent Life", (if applicable) and repeat steps for Beneficiary information. If this step is not needed, continue with enrolling a new hire.

Note: If Employee had named dependent/other Beneficiary and also wanted an External Organization to be a Beneficiary, then each Beneficiary needs the designated amount (amounts have to equal to 100%; or one can be selected as a contingent Beneficiary).

The Employee must associate a percentage with each individual he/she selects as a beneficiary. If not, the individual(s) will not be added on the life insurance plan as a beneficiary. Also, the total percentage must equal 100%. The Beneficiary percentage must equal 100% and the Contingent percentage must equal 100%. Finally, only whole numbers can be used.

Click "Accept"

Click "Enroll"

Click "Enroll"

After enrolling the new hire, you will get a message "Enrollment completed successfully"

Select "Confirmation"

Change output device to ZPDF (must type-no drop down box) then select "Print Preview" – Print pages and give copy to Employee.

Transaction Complete

Employee Demographic Updates/Corrections

This transaction will allow you to correct and/or update the Employee's demographic data such as names, gender, social security number, birthday, marital status and address. Any corrections for dependents are to be sent to the Enrollment Information branch.

Step 1: PA 30 Maintain HR Master Data (select from menu on left)

In the "Personnel No." field, enter Employee's Personnel No. or use the search options to find Employee's Personnel No.

Click "Enter" (verify Employee information)

Select "Basic personal data" tab

Select Infotype "0002 Personal Data" (highlight)

Click "Change -if you are correcting an error

Click "Copy" -if you are updating information

Note: Only chose "Change" if you are correcting data that has been wrong since the Employee's initial entry into KHRIS. If you are updating a name due to a name change, make sure the Employee has a new social security card reflecting the name change. If you are correcting information and clicked "Change", do not change the "Start Date". If you are updating the information, enter today's date in the "Start Date" field. Update any applicable demographic data. Use "Copy" to update address.

If you are **correcting** information and clicked "change", don't change the "Start Date". If you are **updating** (click "copy") the information, enter today's date in "Start Date" field. Make necessary changes or updates to the applicable demographic data.

In this instance, marital status was updated and a middle name was added. "Copy" was used.

For address changes/updates, select Infotype "0006 Addresses" (highlight)

Select "STyp 1 Permanent residence" (from pop-up box)

Click √ and make updates/corrections

Note: If there is not a telephone number listed you can enter it during this transaction. The first telephone number listed should be the primary phone number. If Employee has multiple numbers to enter, use the "Communications" area to enter multiple numbers Use the drop down menu next to "Type" field. If applicable, enter extension for work numbers. Repeat this step if needed to add additional phone numbers.

Enter "County code" (use drop down box) and make sure it matches the zip code listed; if it does not match you will get an error.

Click "Save"

Click "Enter" to acknowledge the message at the bottom

Transaction Complete

Terminating Participation

Step 1: PA20 Display HR Master Data (select from menu on left)

Note: This step is to VERIFY information only.

Enter Personnel No. of Employee in the Personnel No. field (if you are unsure of the Employee's Personnel no, you will need to do a Social Security Number search using ZAU_SSN- Social Security Search **as directed in Step 1 on Page 8 of this User Guide**.

Click "Enter"

Verify this screen to make sure Employee information is correct

On the same screen, select the "Benefits" Tab

Click on "0167 Health Plans" then after checking the health plan, Click on "0168 Insurance Plans" to check the life insurance plan, and click on "0170 Flexible Spending Accounts" to check flexible spending accounts.

Click "Display"

Terminating Participation
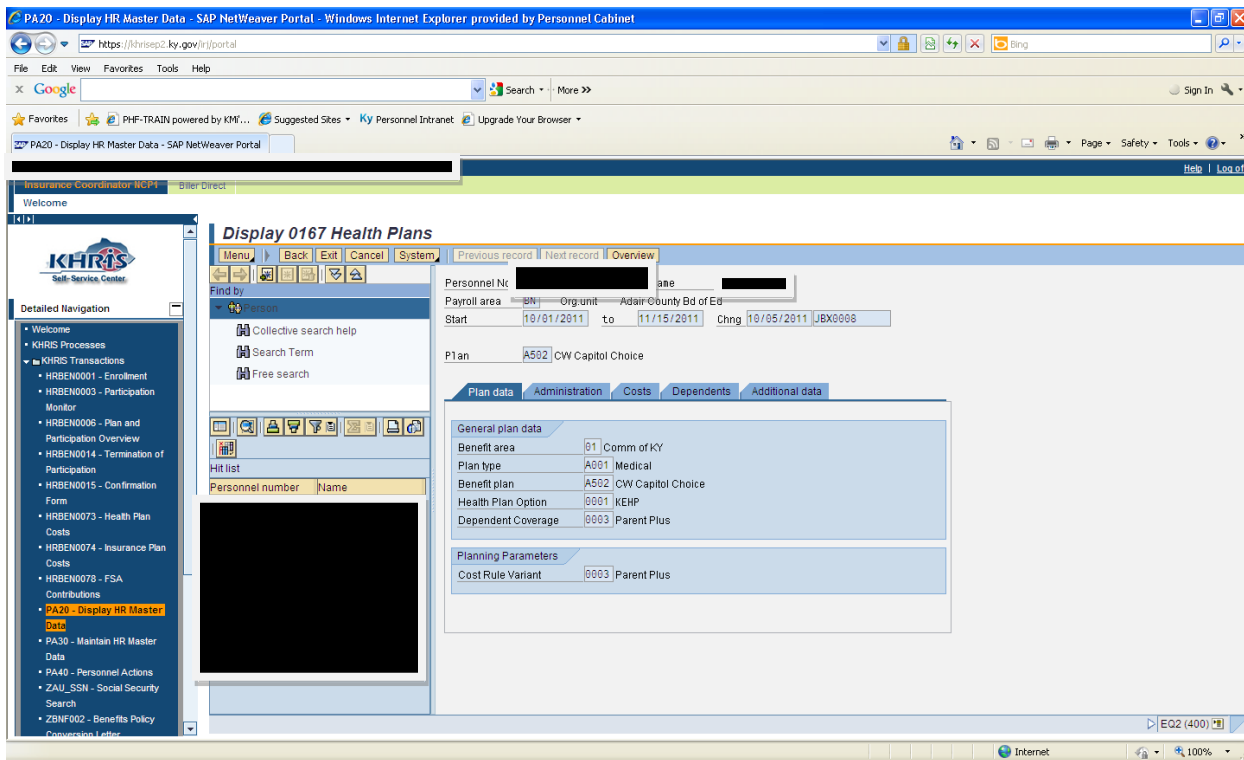
Note: The above steps are to make sure you have the correct Personnel No. and to verify that the health and life plans have not been terminated. You can also repeat these steps for "0168 Insurance Plans and 0170 Flexible Spending Accounts". If the plan has been terminated and all information (dates) are correct, then nothing needs to be done. If you are sure of the correct Personnel No. and the plans have not been terminated, then you can skip this step and go to Step 2.

Terminating Participation

Step 2: PA 40 Personnel Actions (select from menu on left)

Enter the Personnel No.

Click "Enter"

Verify that you have the correct Employee

Terminating Participation

In the "From" field enter the day **AFTER** last day of work (i.e. if Employee's last day of work is 11/01/11; you will enter 11/02/11)

Terminating Participation

Select "End Participation" (highlight)

Click "Execute"

Terminating Participation

Copy 0000 Actions

At this screen, you will **NOT** enter any information. The day AFTER last day worked will populate in the "Start" field.

Click "Save"

Click "Enter"

Copy 0001 Organizational Assignment

At this screen, you will **NOT** enter any information. The day AFTER last day worked will automatically populate in the "Start" field.

Click "Save"

Click "Enter"

Step 3: HRBEN0014 Termination of Participation (select from menu on left)

Enter Personnel No.

Go to the calendar selection and enter last day worked (i.e. last day of work is 11/01/2011)

Click "Select"

Terminating Participation

Click on "Expand" – This will allow the date information to be seen to make sure termination dates are correct
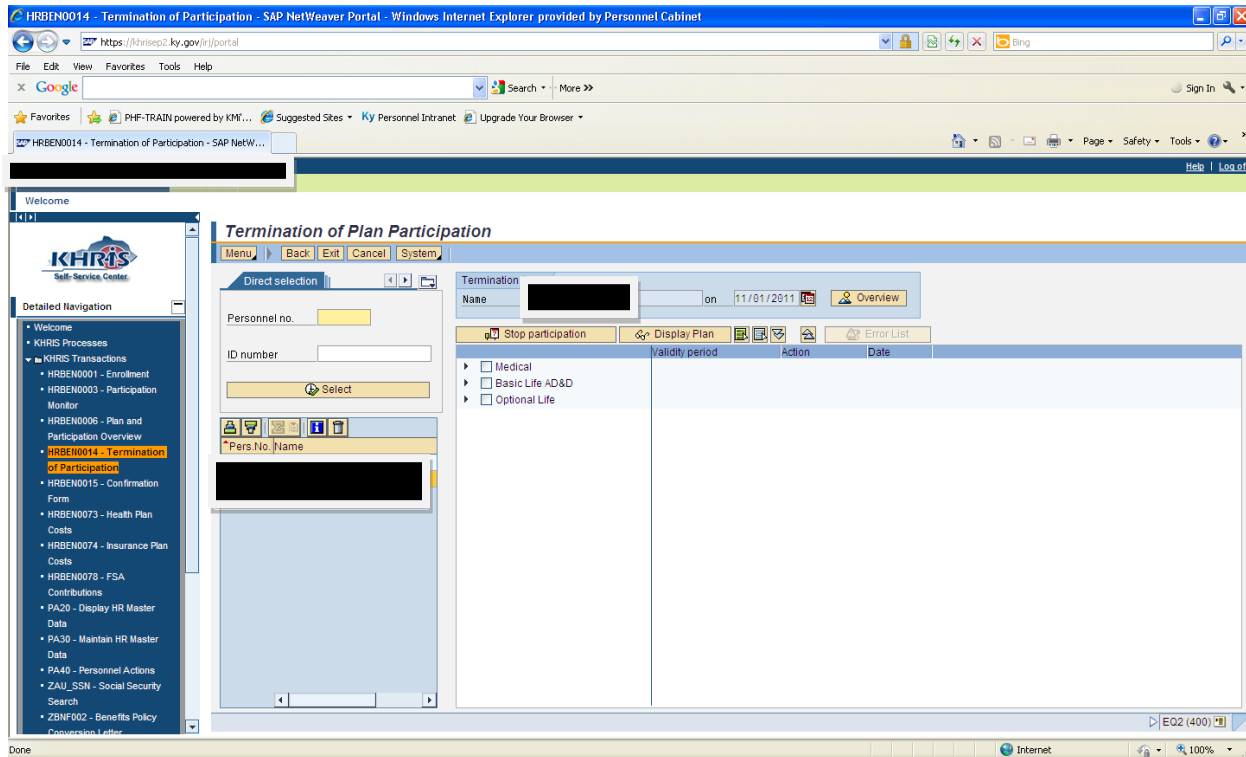
Terminating Participation

Click "Select all" this will **select all** health and life plans for termination.

Select "Stop participation"

Terminating Participation

Select "Stop participation"

Terminating Participation

Click √

Terminating Participation

To verify that health plan, life plans and flexible spending accounts have been terminated; go back to **PA 20 Display HR Master Data (select from menu on left)**

In the Personnel No. field enter Employee's Personnel No.

Click "Enter"

Select the "Benefits" tab

Click on "0167 Health Plans" then after checking the health plan, click on "168 Insurance Plans" to check the life insurance plan, and then if applicable, click on "0170 Flexible Spending Accounts" to check any of the flexible spending plans

Click "Display"

Terminating Participation

The "To" date will be the last date of coverage (termination)

Transaction is complete

Terminating Participation

Reinstating Benefits With No Break in Employment For a Rehire

Note: This process is used for Board of Education Insurance Coordinators who are reinstating an Employee's benefits with no break in employment. This transaction is for a **Rehire**, not a transfer that is coming from another school board. The assumption is that the Employee has been an Employee with the school board and the benefits have been inactivated. This process will bring the Employee back to the school board with no break in employment (i.e. Employee's coverage ended on 08/31as a summer extension. Contract renewed and coverage will begin again on 09/01.) If the Employee participated in a cross-reference plan, please send the update to DEI Enrollment Branch and Life Insurance Branch.

Step 1: Select PA40-Personnel actions (select from menu on left)

In the "Personnel no." field, enter Employee's Personnel No.

In the "From" field, enter the date after the day the Employee was terminated in KHRIS (i.e. Employee was terminated 09/01, enter 09/02)

Click on "BN-Rehire" to highlight

Personnel   no

Click "Execute"

Note: Very little information is to be changed on the next few screens, unless there is an update. These screens are for verification purposes.

Copy Actions 0000

In the "Reason for Action" field, choose B6 BN-Rehire 01 0 Days Break (from drop-down menu)

In the "Position" field, enter 99999999 (always)

Click "Save"

Click "Save"

Copy 0001 Organizational Assignment

Click "Enter" (twice) until message at bottom states "Save your entries"

Click "Save"

Copy 0002 Personal Data

Note: No information is to be entered on this screen, unless changes are needed.

Click "Save"

Click "Enter"

Copy 0006 Address

Note: No information is to be entered on this screen, unless changes are needed.

Click "Save"

Click "Enter"

Create 0105 Communication

Note: No information is to be entered on this screen, unless changes are needed. If Employee does not have an email address, select next record. If Employee chooses to add an email, add the email address.

Click "Save"

Click "Enter"

Copy 0008 Basic Pay

Note: No information is to be entered on this screen, unless changes are needed.

Click "Save"

Click "Enter"

Click "Enter"

Copy 0171 General Benefits Information

Note: No information is to be entered on this screen, unless changes are needed.

Click "Save"

Click "Enter"

Note: The next screen will take you back to the beginning of PA 40 -Personnel Actions Screen.

Step 2:   Select PA30-Maintain HR Master Data (select from menu on left)

In the "Personnel no." field, enter Employee's Personnel No.

Click "Enter"

Note: Verify Employee's Information

Click "Benefits" tab

Select Infotype "0167 Health Plans" (to highlight)

Click on "Copy"

In the "Start" box change the date to the day after the coverage was ended; (example coverage ended 5/31/2012, enter 06/01/2012)

In the "To" date box, change the date to be 12/31/9999

Click "Save"

Note: The next screen will take you back to the beginning of PA 30 –Maintain HR Master Data Screen.

Note: This is for the Basic Life AD&D plan. If the Employee has additional insurance plan besides the Basic Life, this step would need to be repeated

Click on "Infotype 0168 Insurance Plans" (to highlight)

Click "Copy"

In the "Start" box change the date to the day after the coverage was ended; (example coverage ended 5/31/2012, enter 06/01/2012)

In the "To" date box, change the date to be 12/31/9999

Click "Save"

Note: This step is only needed if there is Flexible Spending Accounts you will need to re-instate. If the Employee does not have a Flexible Spending Account (Health/Dependent), then the transaction is either completed or continue with below steps.

Select "Infotype 0170 Flexible Spending Accounts" (to highlight)

Click "Copy"

In the "Start" box change the date to the day after the coverage was ended; (example coverage ended 5/31/2012, enter 06/01/2012)

In the "To" date box, change the date to be 12/31/9999

Click "Save"

Transaction Completed

Begin Leave Without Pay (LWOP)-non FMLA

Note: This transaction is for an Employee who goes on unpaid official leave or unpaid military leave. If the Employee is a cross-reference, the application will need to be sent to DEI Enrollment Information Branch (EIB) and KGLI for processing. Do not process FMLA using these steps as Employees maintain eligibility for benefits while on FMLA. If you have questions regarding FMLA, please contact EIB and/or KGLI.

Step 1: PA 20 (select from menu on left) Note: Step 1 is to check to see if Employee has been termed for both health and life plans.

In the "Personnel No" field, enter Employee's Personnel No

Note: If you can't remember Employee number, then do a SSN search by selecting ZAU_SSN Social Security Search (select from menu on left). Enter Employee's SSN in the search box and click "SSN Search, then "Enter. This will give you the Employee Personnel No

Select "Benefits" tab

Click on "0167 Health Plans" (highlight)

Click "Display"

Click on "0168 Insurance Plans" (highlight)

Click "Overview" to display all life plans

Click on "0170 Flexible Spending Accounts (highlight)

Click "Overview" to display all flexible spending accounts

Remember, the above steps are to check if the Employee has already been termed in KHRIS.

Note: If Employee has already been termed from health, life and FSA accounts (if applicable), no further processing is needed in KHRIS. If the Employee had not been termed, proceed to **Step 2**.

Step 2: PA 40 Personnel Actions (select from menu on left)

In the "Personnel No" field, enter Employee's Personnel No

In the "From" field enter the beginning date of the LWOP (day **AFTER** last day worked)

Select "BN – Begin Leave W/ Out Pay" (to highlight)

Click "Execute"

Copy 0000 Actions

Note: KHRIS will populate the start date for you. You will **not** have to enter a date.

Click on the "Reason for Action" field, (drop down box will appear) from the drop down box choose whichever applies to the Employee (unpaid official leave or unpaid military). Do not process a LWOP that is for FMLA.

Click √

In the "Position" field enter 99999999 (always)

Click "Save"

Click "Enter"

Click "Enter" to acknowledge message at bottom of screen

Create 0378 Adjustment Reasons

Note: No information is to be entered on the screen. View dates and adjustment reason to make sure correct.

Click "Save"

Step 3: HRBEN0014 – Termination of Participation (select from menu on left)

In the "Personnel No" field, enter Employee's Personnel No

Go to the calendar selection and enter last day worked (i.e. last day of work is 11/30/2011)

Click "Select"

Click "Select all" this will **select all** health, life plans and flexible spending accounts for termination

Click on "Expand" – This will allow the date information to be seen to make sure termination dates are correct
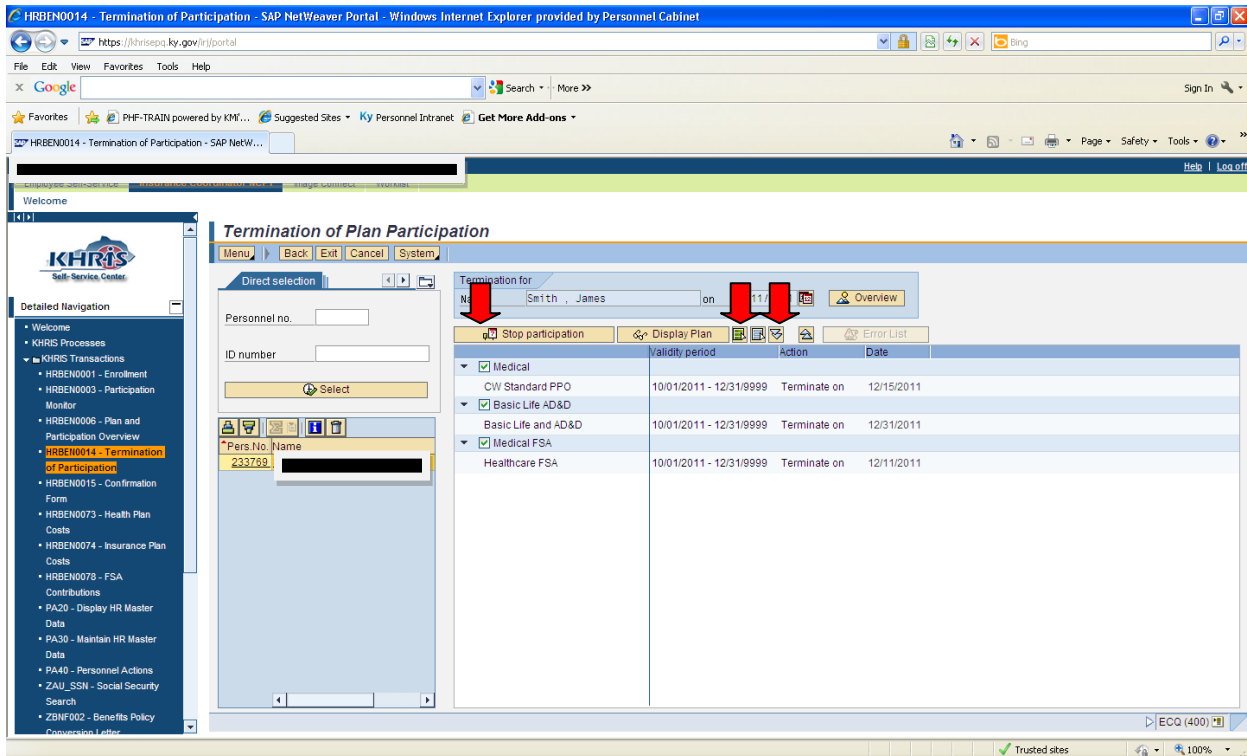
Click "Stop Participation" (this is to term health plan, life insurance plans and flexible spending accounts)

Select "Stop participation"

Click √

Transaction Complete

Note: Please communicate to Employee the ability to continue any/all Life coverage provided premiums are paid.

Health Benefit Enrollment Reporting

Step 1: Select HRBEN0073 Health Plan Costs (select from menu on left)

Note: This report can be used to gather current or future health plan enrollment information. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click "Search helps" tab

Select "K –Organizational Assignment"

Click √

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field

Click √

Note: This will take you back to the Health Plans Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report that is generated will only pertain to your Agency.

To run a report on **current elections**, under the Key date box, select "Today"

Note: Only use personnel number field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees. For instructions on how to run for future dates, see page 123.

Click "Execute"

Note: This screen shows what the report will look like with the current date. A list of your Employees along with health benefit election data will appear.

Click "Back" to return to Health Plan Costs report screen

To run a report for **future elections**, under the Key date box, select "Other key date"

Enter the date for which you are gathering election data in the "Key Date" box

Note: Only use personnel number field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees.

Click "Execute"

Note: This screen shows what the report will look like with the current date. A list of your Employees along with health benefit election data will appear.

To export this data into an excel spreadsheet:

Click "Menu"

Click "List"

Click "Export"

Click "Spreadsheet"

Click" Excel (MHTML Format)"

Note: To save the file, choose a folder and click save. Once you have saved and opened the excel file, you can modify the way you need to view and/or print the report.
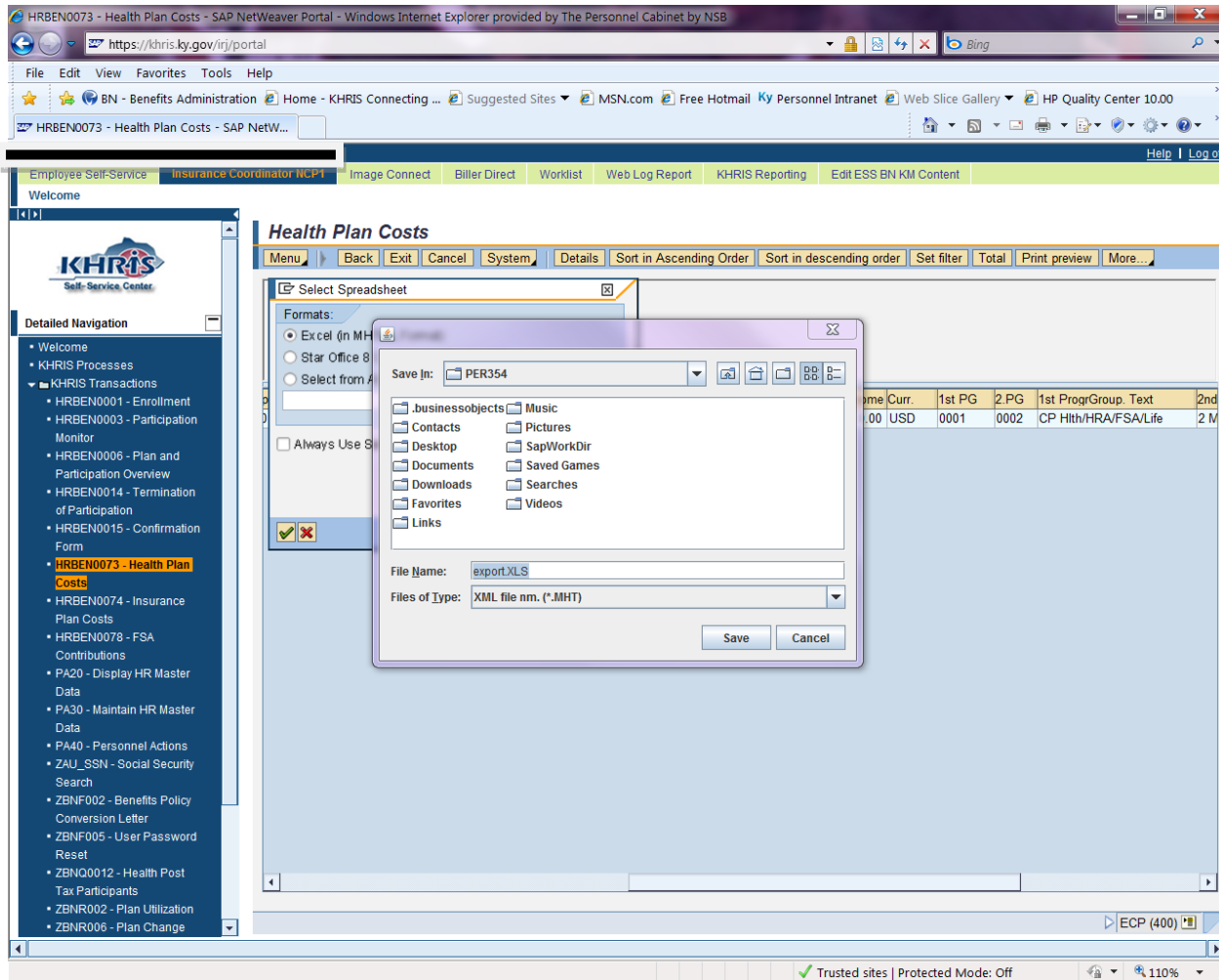
Transaction Complete

Plan Change History Report

This report allows you to see changes made to your agency's population based on a number of criteria. As with other reporting in KHRIS, running during non-peak times (early morning or evenings) will help with getting results without timing out of the system.
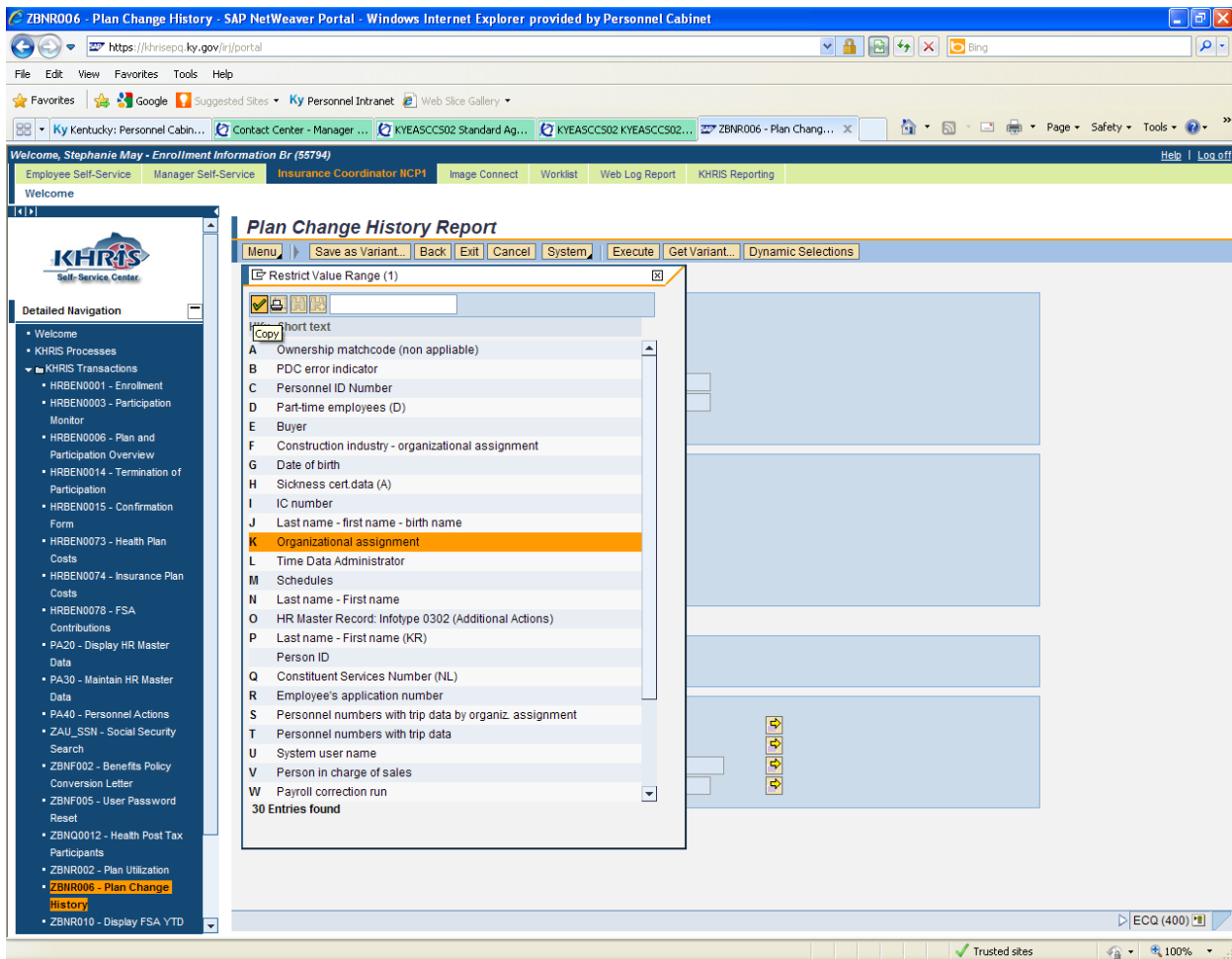
Step 1: Select ZBNR006 Plan Change History (select from menu on left)

Click "Search helps" tab

Select "K – Organizational Assignment"

Click √

Enter **your** Agency's "Organizational Unit Number in the Organizational Unit field

Click √

Note: This will take you back to the Plan Change History Report screen. After the Agency's Organizational number has been entered, the "Search helps" field will change to "Search helps K". This indicates that the report generated will only pertain to your Agency.

You can run the report based on different periods. These periods indicate the effective date of the change. You can choose any of the radio buttons.

If you want to see changes for a certain period of time you need to click "Other Period".

In the "Data Selection Period" boxes enter the period you want to show on your report. For example if you want to show all changes made to your members during or after 2011's Open Enrollment period Use 01/01/2012 as the first date box and a later date in the "To" box.

You can also run this for one day by using the same day in both boxes.

Once you have chosen a period you can click "Execute"; however you can add more data to further specify the data the reports returns.

For example if you only want to know changes made to a Plan type (Health Plans, FSA accounts, Basic Life etc.) you can choose a Plan type. **Note:** Leave this field blank if you want to see changes on all plan types. You can limit the report to specific Benefit plans. Leave this field if you want to see all Benefit Plan changes.

"Changed By Data" can be used by entering a specific USER ID ABC1234, if you want to see more than one user (if there are multiple ICs that do entry at your agency) Click on the Multiple Selection (**Note:** This shows when you put your "mouse" on top of the yellow arrow In the Additional data box. Click yellow arrow by "Changed By")

Enter the "PRNRs" in the info box

If you want to see changes made by any users leave this field blank. If you want to see changes made due to a file upload, enter BATCH_BN in the "Changed By" field

Use "Changed on" dates in order to capture changes processed within a particular date range. For example, if you want to see changes processed in KHRIS in September 2011, use 09/01/2011 in the first data box and 09/30/2011 in the "to" box. You can also use the "Multiple Selection" choice to choose specific dates or multiple ranges.

If you want to see changes made on any date, leave these boxes blank. However, it is advisable to use at least one selection criteria. Running the report without any defined criteria will take extended amounts of time and may cause you to time out. The more you define criteria the more specific your report will be.

As an example this report is asking for changes made with an effective date of 01/01/2012-01/31/2012 processed by a particular user between 12/01/2011 and 12/31/2011.

After the criteria you want to report on is entered, click "Execute". In this instance the report will show any changes that were made effective 10/01/2011 to 12/31/2011 and were entered into KHRIS between 09/01/2011 and 12/31/2011 by all users.

The report generated will look like this:

You can download this to an excel spreadsheet

To export to a spreadsheet click "Menu" tab then click, "List, Export, Spreadsheet"

When given the option, choose Excel as the Format

Click √

Note: If you get a security information notification that states "The application's digital signature has been verified. Do you want to run the application?" "√ (box should be checked) Always trust content from this publisher."

Click "Run"
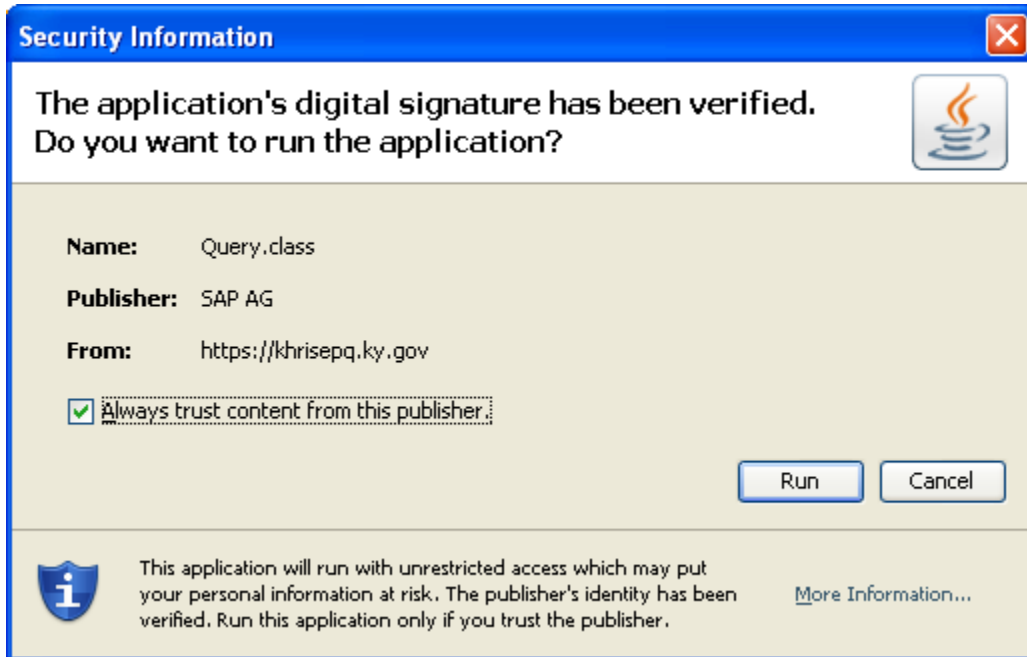
Change the file name to a suitable name and save the file in a folder.
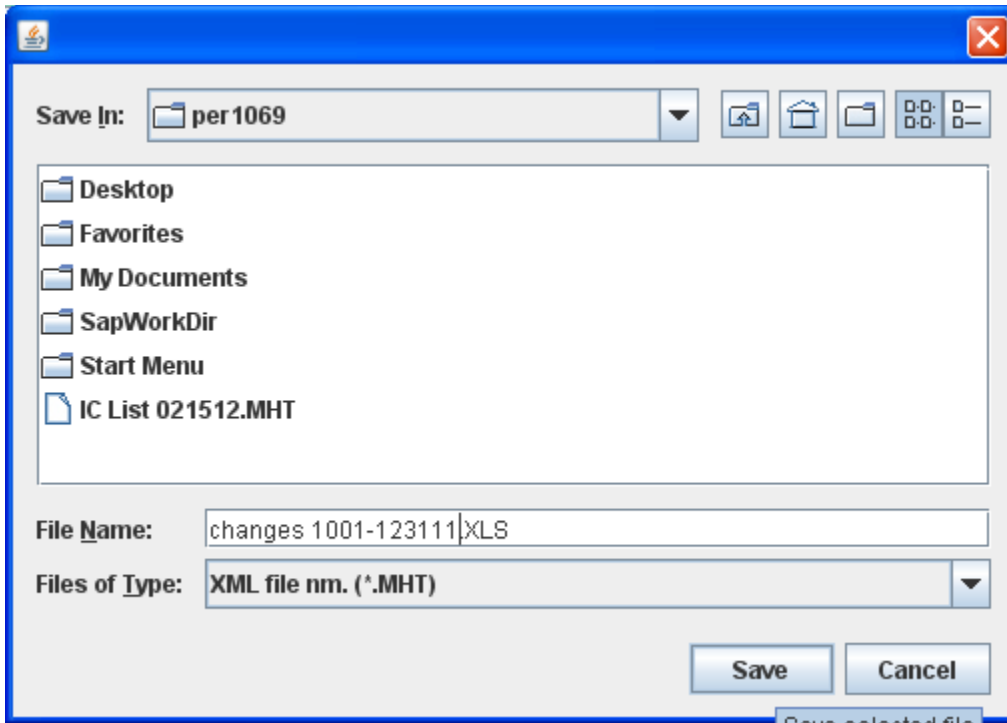
From there you can open in Microsoft excel and manipulate the data.

Insurance Plan Cost Report

Step 1: Select HRBEN0074 Insurance Plan Costs (select from menu on left)

Note: This report can be used to to review and make sure Employees are enrolled, and enrolled in the correct plans. The report should be ran in the morning or late afternoon when there are fewer users in the KHRIS system.

Click "Search helps" tab

Select "K –Organizational Assignment"

Click √

Enter **your** Agency's "Organizational Unit Number" in the Organizational Unit field

Click √

Note: This will take you back to the Insurance Plans Costs screen. After you enter your Agency's Organizational number, the "Search help" field will change to "Search help K". This indicates that the report that is generated will only pertain to your Agency.

To run a report on **current elections**, under the Key date box, select "Today'

Note: Only use the "Personnel number" field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees. For instructions on how to run for future dates, see page 147.

Click "Execute"

Note: This is what the generated report should look like. If you scroll down, you will find Optional and Dependent coverage information with the proper plans and premiums. This example of the report reflects columns that are hidden. If you choose to hide columns after the repor has generated, right click on the column you wish to hide and click "Hide" and that column should disappear from viewieng**.**

The columns that will be **useful** are: Benefit Plan Text (Plan types: Basic, Optional and Dependent); Pers. No.; Name; ID Number (Social Security Number); G (Gender); Entry; Part.date (Participation Date); Insurance Option Text (Coverage Volume); EE Cost; ER Credit; Ins. Coverage; and Birth date.

Click "Back" to return to Insurance Plan Costs report screen

To run a report for **future elections**, under the "Key date field, select "Other key date"

Enter the date for which you are gathering election data in the "Key date" field

Note: Only use the "Personnel number" field if you need information for a particular Employee. Otherwise, this step will obtain a complete listing of your Employees.

Click "Execute"

Note: This screen shows what the report will look like with a future date. A list of your Employees along with life insurance benefit plan data will appear.

To print report, click "Local file"

Click "Spreadsheet"
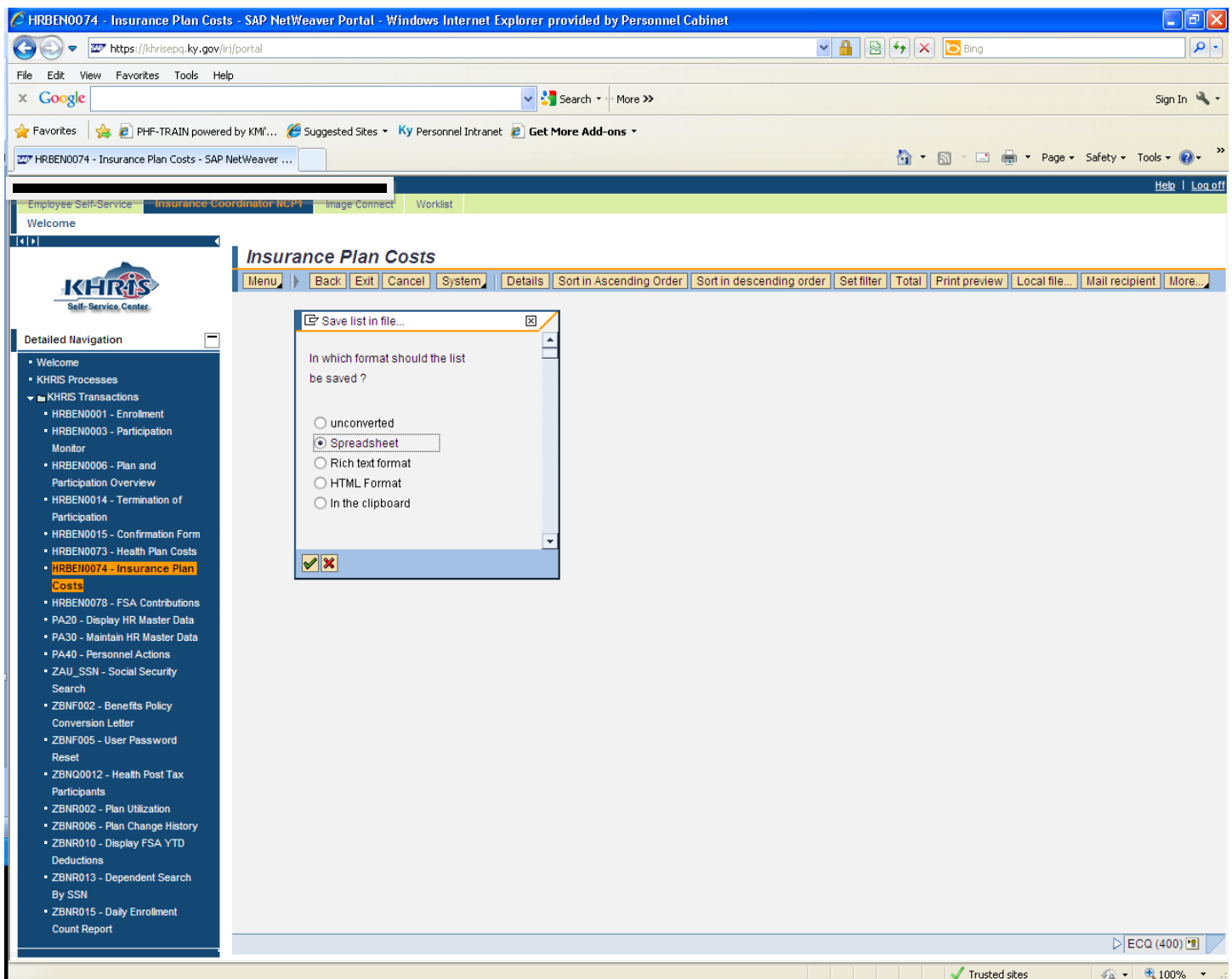
Click √

Click on "Drop down box"

This box will appear allowing you to name and save your report to your local directory
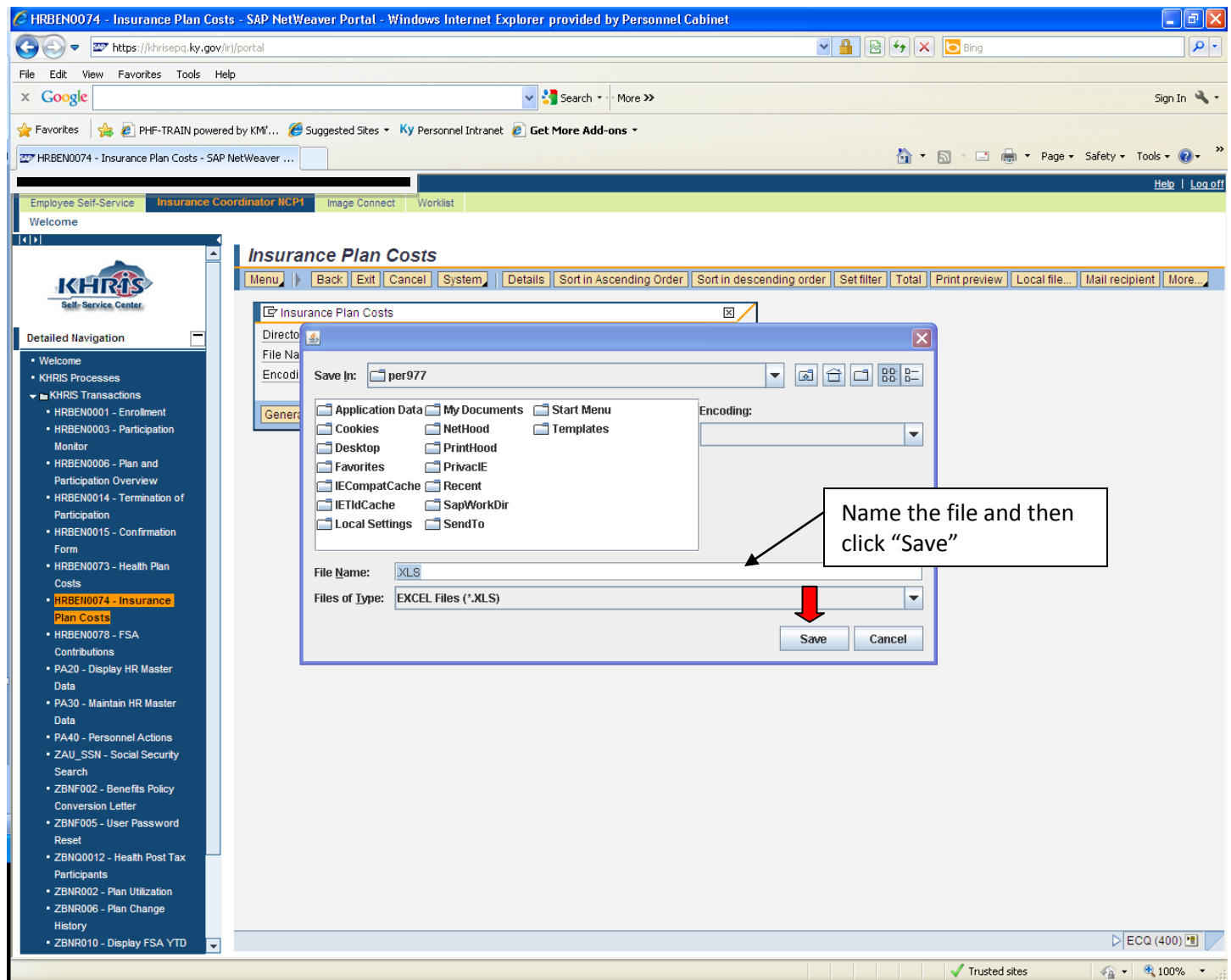
Click "Save

The below screen example, the file is named Insurance Plan Cost and is being saved to desktop (or can save to My documents-your choice)
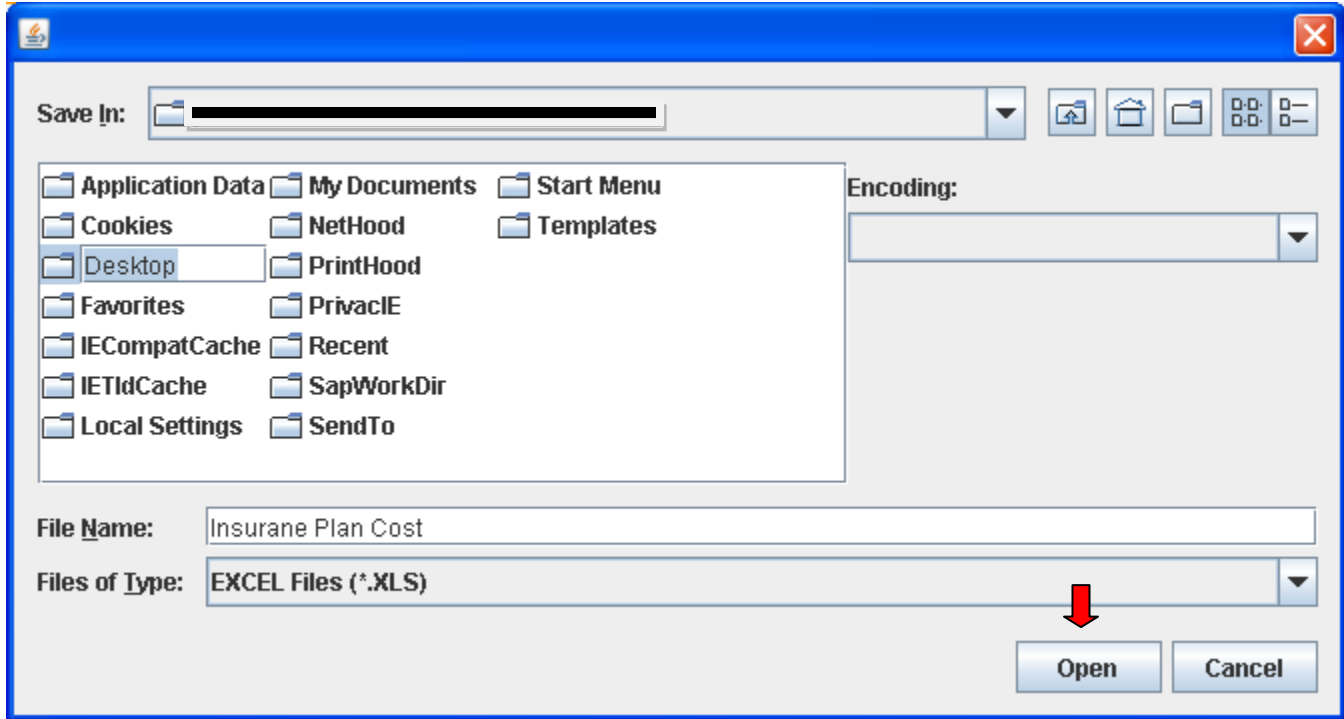
Click "Open"

Note: This will allow you to open the excel report and allow printing.

Transaction Complete

How to run a Smoker Status Report

Step 1: HRBEN00001" (select from menu on left)

Click on "Menu"

Go to "System"

Go to "Services"

Go to "Direct Input"

Select "Start SAP Easy Access"

Click the arrow ➡ beside the "Benefits Adminstrator Folder"

Scoll down and click on "ZBNQ0018-Smoker Status"

Under "Period", click on the drop down box and select which period you want to run your report

Click on "Search Help"

Select "K Organizational assignment"

Enter Organizational Unit number

Click √

Click "Execute"

This generated report will list all members and has a X by those with smoker status.

Transaction Complete

Health Post Tax Participants Report

Step 1: HRBEN00001" (select from menu on left)

Click on "Menu"

Go to "System"

Go to "Services"

Go to "Direct Input"

Select "Start SAP Easy Access"

Click the arrow ➡ beside the "Benefits Adminstrator Folder"

Scoll down and click on "ZBNQ0012- Hlth Post Tax Participants"

Under "Period", click on the drop down box and select which period you want to run your report

Click on "More"

Note: "A005" defaults into the Benefit plan "field". Please leave this default and do not change any other "fields".

Click "Search Help"

Select "K Organizational assignment"

Enter Organizational Unit number

Click √

Click "Execute"

This generated report will only list members, that have a post tax plan.

Transaction Complete

Life Insurance Benefits Policy Letter Conversion

Step 1: ZBNF002 - Benefits Policy Conversion Letter (select from menu on left)

In the "Reporting Period" field, do not make any changes – it will state "All"

In the "Insurance Coordinator field", enter your name

In the "Insurance Coordinator Title" field, enter your title

Click on "Delta File"

For example purposes:

In the "Changed –On Date From" field, enter 10/01/2011

In the "Changed –On Date To" field, enter 10/07/2011

Note: This process should take place **every Friday** of the week (example on **Friday 10/07/11** you are using **Changed-on Date From 10/01/2011** to **Changed-On Date To 10/07/2011**). This will pick up Employee (s) that has termed during the week. In turn, the conversion letter will be mailed in a timely manner. ****The Employee only has **31 days** to convert their conversion to an individual whole life plan.

Click "Search Help"
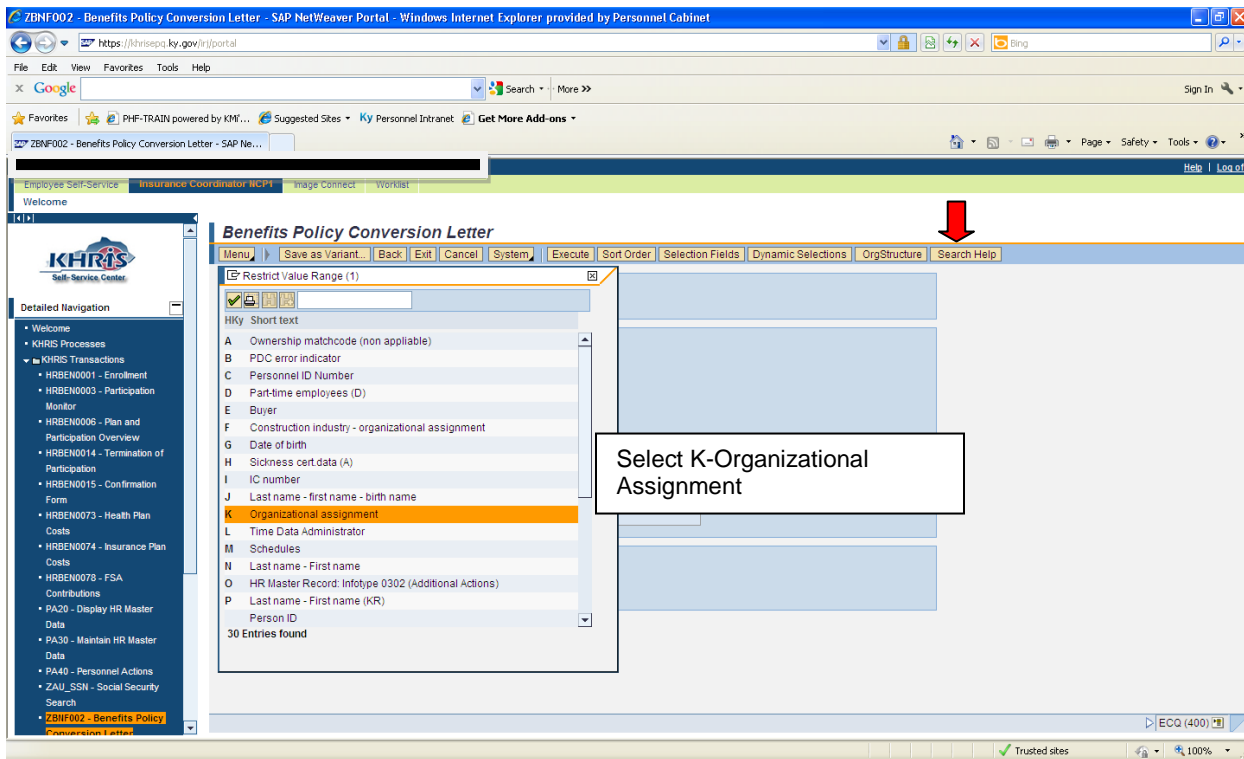
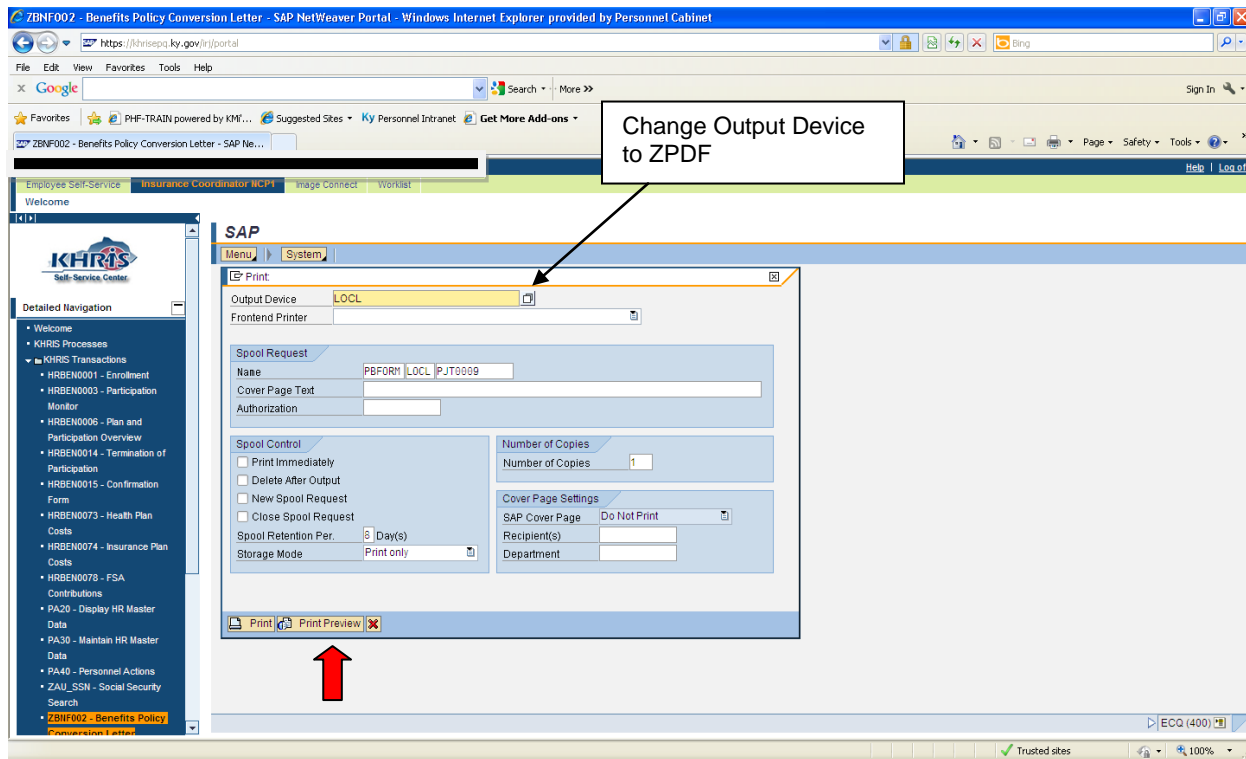Select "K Organizational assignment"

Click √

In "Organizational unit" field, put in your Agency's organizational unit number or use drop down box
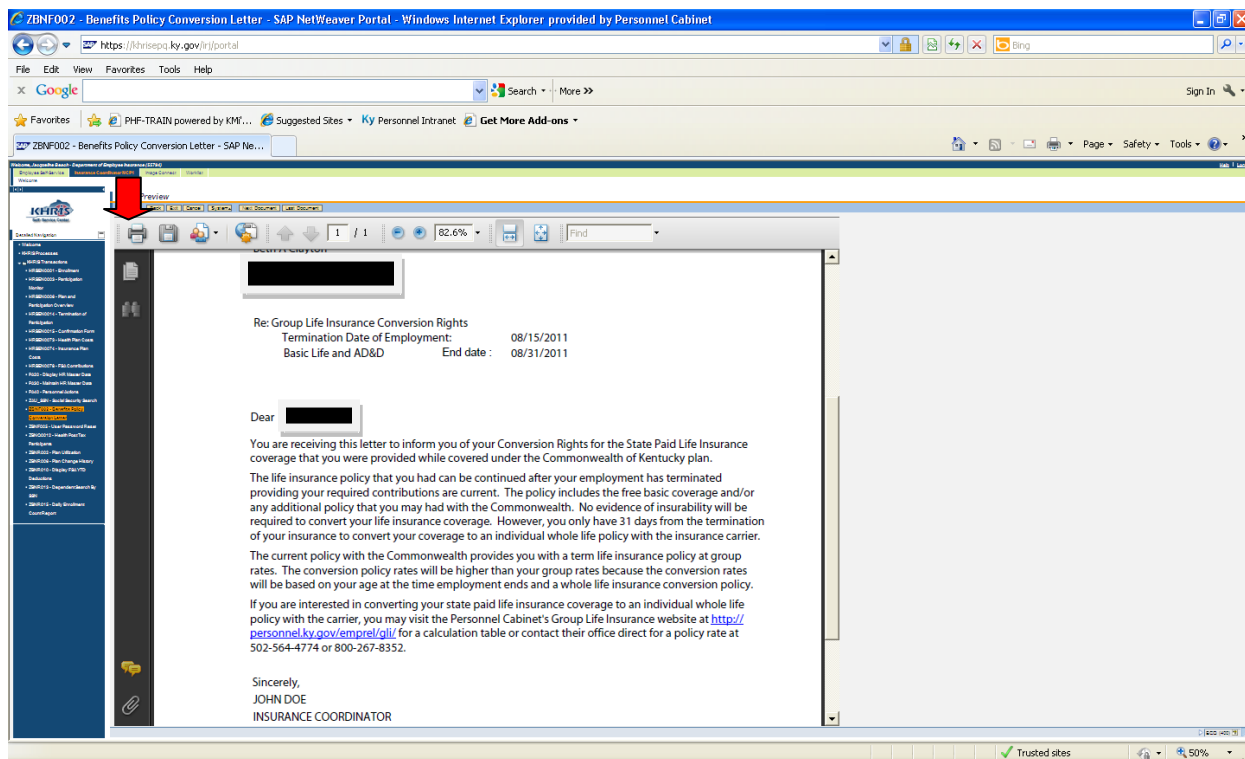
Click √

Click "Execute"

Change "Output Device" to ZPDF

Click "Print Preview"

Example of the letter you will get from the transaction:

Click "Print" to print the letter

Note: If you process a term on the current day and want to generate a letter immediately you would follow the below steps:

In the "Reporting Period" field, use the drop down box and select "Today"

In the "Personnel Number" field, enter the Employee's Personnel Number

Select "Full File"

Click "Execute"

Transaction Complete